

Project title : Calculating Family Expenses Using Servicenow

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CALCULATING FAMILY EXPENSES USING SERVICENOW

Aim of the project

To develop a centralized and automated platform that helps individuals or families track, manage, and optimize their expenses with ease. The goal is to promote financial discipline and simplify budget planning by using the powerful features of ServiceNow like scripting, reporting, and process automation. The project aims to develop a comprehensive expense calculation system using ServiceNow. This system will enable users to track and manage family expenses efficiently. It will include features such as expense categorization, budget setting, real-time tracking, and reporting capabilities. Utilizing ServiceNow's robust platform, the project will ensure seamless integration, user-friendly interface, and scalability to accommodate varying family sizes and financial complexities. The end goal is to empower users with the tools they need to make informed financial decisions and promote financial well-being within the family unit.

Milestone-1

Setting up servicenow instance

1. Sign up for a developer account on the ServiceNow Developer site "<https://developer.servicenow.com>".
2. Once logged in, navigate to the "Personal Developer Instance" section.
3. Click on "Request Instance" to create a new ServiceNow instance.
4. Fill out the required information and submit the request.
5. You'll receive an email with the instance details once it's ready.
6. Log in to your ServiceNow instance using the provided credentials.
7. Now you will navigate to the ServiceNow.

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ServiceNow

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servicenow

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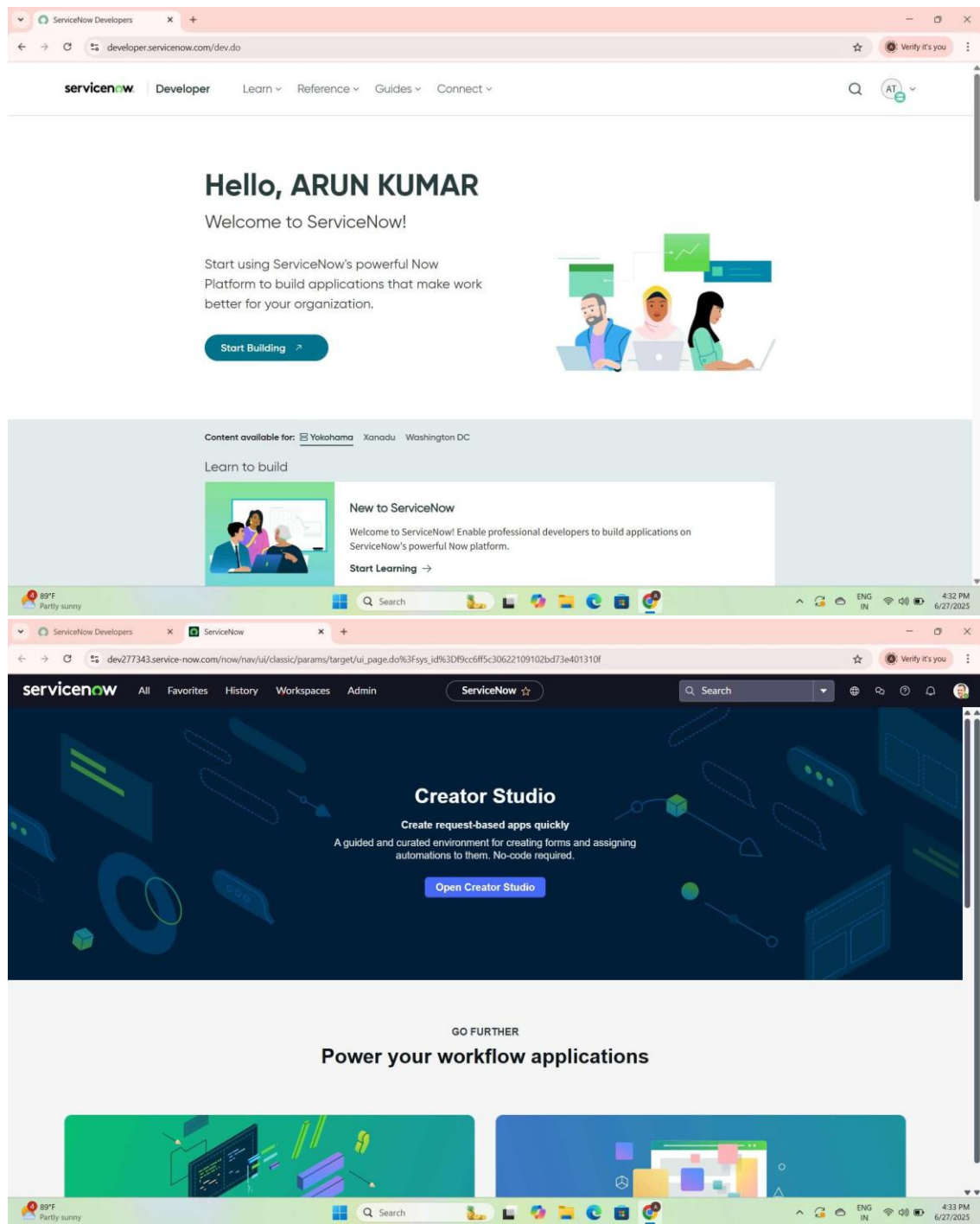
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89°F Partly sunny

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Milestone-2

Creation Of New Update Set

1. Go to All >> In the filter search for Local Update set > click on New.
2. Enter the Details as: Name : Family Expenses
3. Then click on Submit and Make current.

The screenshot shows the ServiceNow Creator Studio interface. The top navigation bar includes 'All', 'Favorites', 'History', 'Workspaces', and 'Admin'. A search bar on the left shows 'local update set' with 'No Results' under 'FAVORITES' and 'Local Update Set' under 'ALL RESULTS'. The main content area displays 'Creator Studio' with the text 'Create request-based apps quickly' and 'A guided and curated environment for creating forms and assigning automations to them. No-code required.' Below this is a 'Power your workflow applications' section with two colorful illustrations.

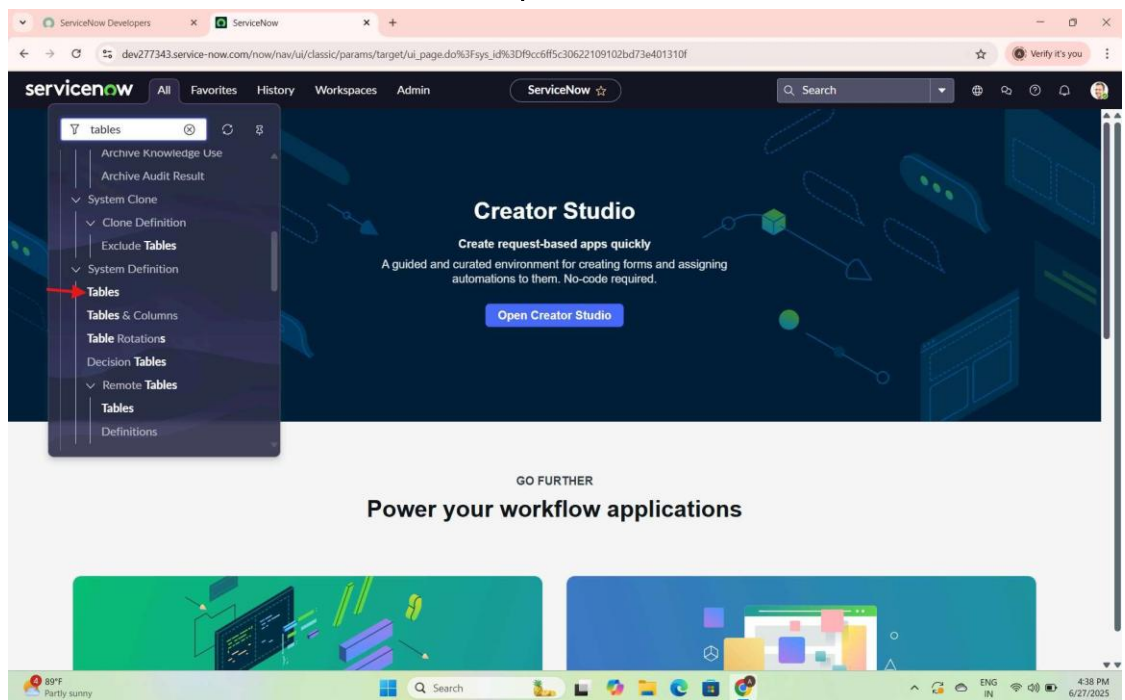
The second screenshot shows the 'Update Set - Family Expenses' configuration page. The form includes fields for 'Name' (Family Expenses), 'State' (In progress), 'Parent', 'Release date', 'Install date', 'Installed from', and 'Description'. The 'Application' is set to 'Global', 'Created' is '2025-06-20 01:47:09', 'Created by' is 'admin', and 'Merged to' is empty. Below the form is a 'Related Links' section with links like 'Make This My Current Set', 'Merge With Another Update Set', and 'Scan Update Set'. At the bottom is a table showing update set logs.

Created	Type	View	Target name	Updated by	Remote update set	Action
2025-06-23 00:00:25	Password Reset Process		Service-Desk Password Reset for Local ServiceNow	admin	(empty)	INSERT_OR_UPDATE
2025-06-20 23:30:00	CMDB Workspace Multisource Class Metadata			admin	(empty)	INSERT_OR_UPDATE
2025-06-20 01:48:28	Application Menu		Family Expenditure	admin	(empty)	INSERT_OR_UPDATE

Milestone-3

Creation Of Family Expenses Table

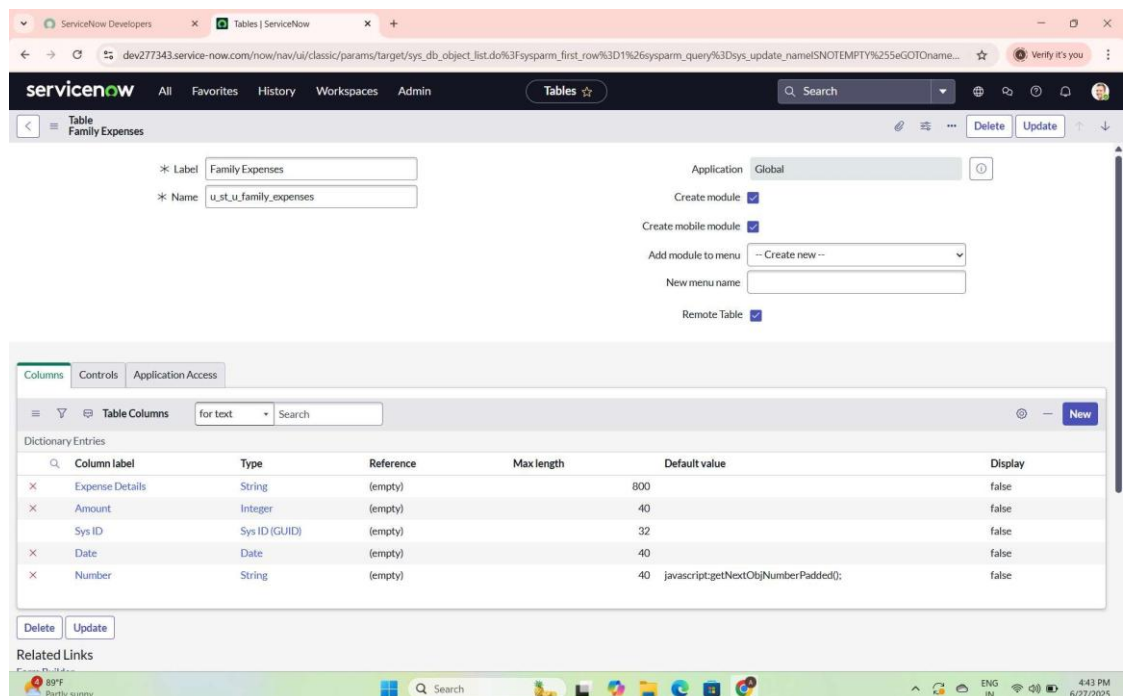
1. Go to All > In the filter search for Tables > click on New.



2. Enter the Details: Label : Family Expenses Name : Auto-Populated New menu name : Family Expenditure
3. Go to the Header and right click there>> click on Save.

Creation of columns(fields)

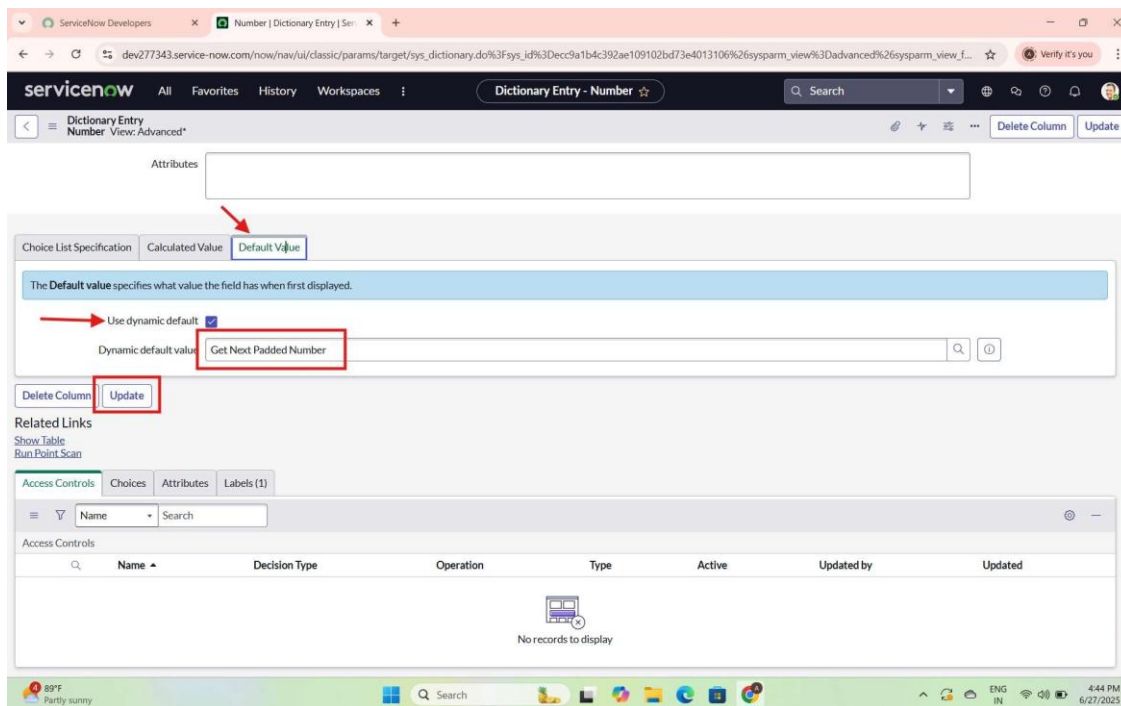
4. Near Columns Double click near insert a new row.
5. Give the details as: Column label : Number Type : String
6. Double click on insert a new row again
7. Give the details as: Column label : Date Type : Date
8. Double click on insert a new row again
9. Give the details as: Column label : Amount Type : Integer
10. Double click on insert a new row again
11. Give the details as: Column label : Expense Details Type : String Max length : 800
12. Go to the Header and right click there>> click on Save.



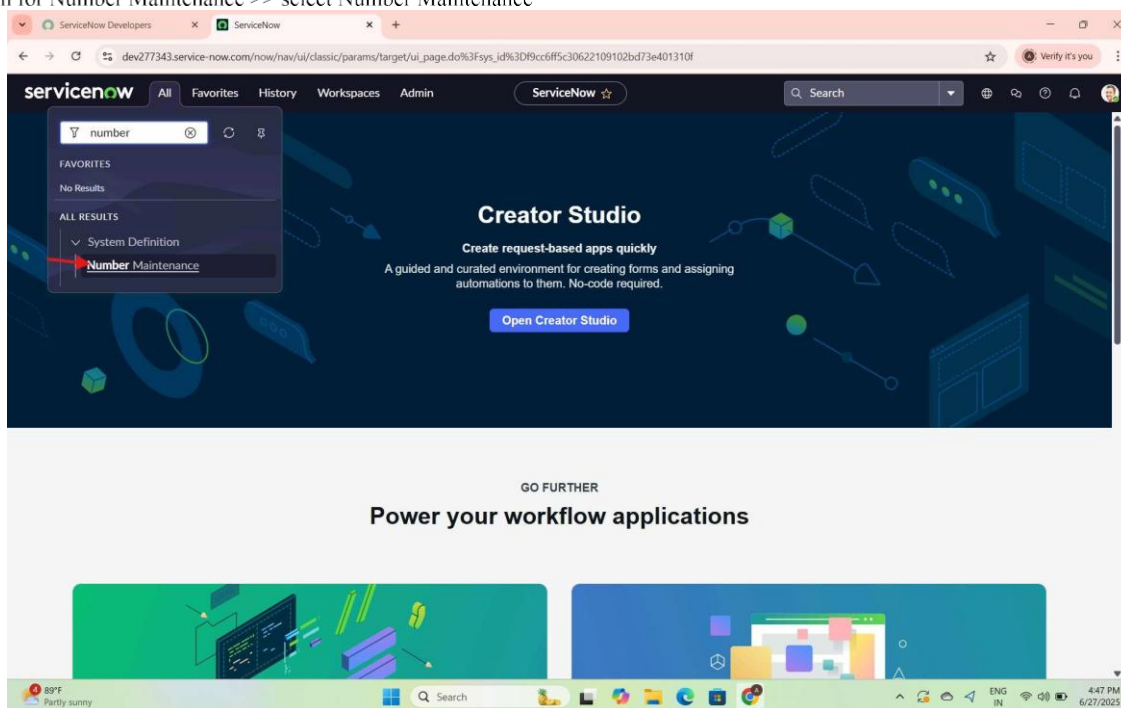
. Making Number Field An Auto-Number

1. Double click on the Number Field/Column.
2. Go down and double click on Advanced view

3. In Default Value: Use dynamic default : check the box Dynamic default value : Get Next Padded Number
4. Click on Update.



5. Go to All >> In the filter search for Number Maintenance >> select Number Maintenance



6. Click on New.
7. Enter the below Details: Table : Family Expenses Prefix : MFE
8. Click on Submit.

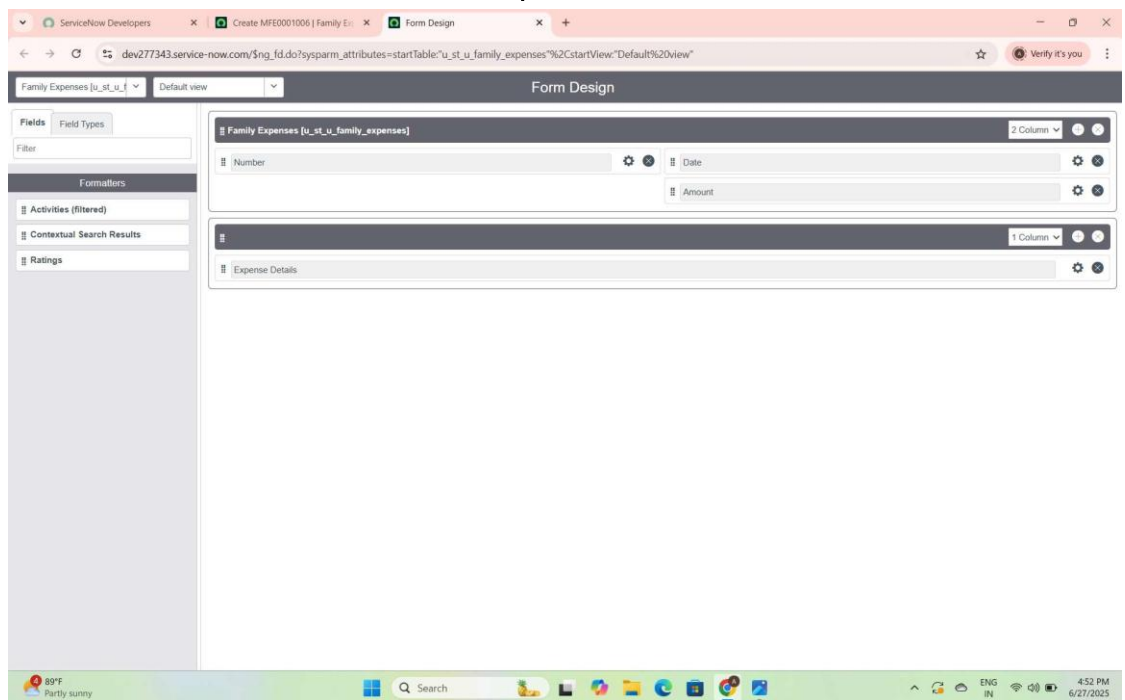
The screenshot shows the ServiceNow configuration page for the 'Family Expenses' table. The table name is 'Family Expenses', the prefix is 'MFE', the number is '1,000', the application is 'Global', and the number of digits is '7'. There are 'Update' and 'Delete' buttons at the top right. Below the configuration fields, there is a 'Related Links' section with a 'Show Counter' link. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 4:50 PM on 6/27/2025.

. Configure the form

1. Go to All >> In the filter search for Family Expenses >> Open Family Expenses
2. Click on New
3. Go to the Header and right click there>> click on Configure >> Select Form Design

The screenshot shows the 'Family Expenses - Create' form in ServiceNow. The form has fields for 'Date' and 'Amount'. A context menu is open over the form, showing options like 'Save', 'Configure', 'Export', 'Create Favorite', 'Copy URL', 'Copy sys_id', 'Reload form', 'Form Builder', 'Form Design', 'Form Layout', 'Related Lists', 'All', 'Table', 'Security Rules', 'Business Rules', 'Client Scripts', 'UI Policies', 'Data Policies', 'UI Actions', 'Notifications', and 'Dictionary'. The 'Form Design' option is highlighted. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 4:53 PM on 6/27/2025.

4. Customize or Drag Drop the form as per your requirement.
5. Make Number Read-Only Field by clicking on the gear icon and checking Read-Only
6. Make Date, Amount Mandatory Field by clicking on the gear icon and checking Mandatory
7. Click on Save.



Milestone-4

Creation Of Daily Expenses Table

1. Go to All > In the filter search for Tables > click on New.
2. Enter the Details: Label : Daily Expenses Name : Auto-Populated Add Module to menu : Family Expenditure
3. Go to the Header and right click there>> click on Save.

Creation of columns(fields)

4. Near Columns Double click near insert a new row.
5. Give the details as: Column label : Number Type : String
6. Double click on insert a new row again
7. Give the details as: Column label : Date Type : Date
8. Double click on insert a new row again
9. Give the details as: Column label : Expense Type : Integer
10. Double click on insert a new row again
11. Give the details as: Column label : Family Member Name Type : Reference Max length : 800
12. Double click on insert a new row again
13. Give the details as: Column label : Comments Type : String Max length : 800
14. Go to the Header and right click there>> click on Save.

The screenshot shows the ServiceNow configuration page for a table named 'Daily Expenses'. The 'Columns' tab is active, displaying a list of columns with their properties. The columns are:

Column label	Type	Reference	Max length	Default value	Display
Comments	String	(empty)	800		false
Expense	Integer	(empty)	40		false
Family Member Name	Reference	.NET Application	32		false
Number	String	(empty)	40	javascript:getNextObjNumberPadded();	false
Created by	String	(empty)	40		false
Sys ID	Sys ID (GUID)	(empty)	32		false
Created	Date/Time	(empty)	40		false
Updated by	String	(empty)	40		false
Updates	Integer	(empty)	40		false
Updated	Date/Time	(empty)	40		false
Date	Date	(empty)	40		false

. Making Number Field An Auto-Number

15. Double click on the Number Field/Column.
16. Go down and double click on Advanced view
17. In Default Value: Use dynamic default : check the box Dynamic default value : Get Next Padded Number
18. Click on Update.

The screenshot shows the ServiceNow configuration page for a dictionary entry named 'Number'. The 'Advanced' view is active. The configuration details are as follows:

- Table:** Daily Expenses [u_daily_expenses]
- Type:** String
- Column label:** Number
- Column name:** u_number
- Max length:** 40
- Active:** ☒
- Function field:** ☐
- Read only:** ☒
- Mandatory:** ☐
- Display:** ☐

Under the 'Default Value' tab, the 'Use dynamic default' checkbox is checked, and the 'Dynamic default value' is set to 'Get Next Padded Number'. The 'Update' button is circled in red.

19. Go to All >> In the filter search for Number Maintenance >> select Number Maintenance
20. Click on New.
21. Enter the below Details: Table : Family Expenses Prefix : DFE
22. Click on Submit.

. Configure the form

23. Go to All >> In the filter search for Daily Expenses >> Open Daily Expenses
24. Click on New
25. Go to the Header and right click there>> click on Configure >> Select Form Design
26. Customize or Drag Drop the form as per your requirement.

The screenshot shows the ServiceNow Form Design interface for the 'Daily Expenses' form. The left sidebar contains 'Fields' and 'Formatters' sections. The main area displays a 2-column layout with the following fields: 'Number', 'Date', 'Expense', and 'Family Member Name'. The 'Number' field is highlighted with a gear icon, indicating it is being configured. The 'Date' and 'Family Member Name' fields also have gear icons. The 'Expense' field is a text area. The bottom of the interface shows a taskbar with various application icons and a system tray with the date and time (4:57 PM, 6/27/2025).

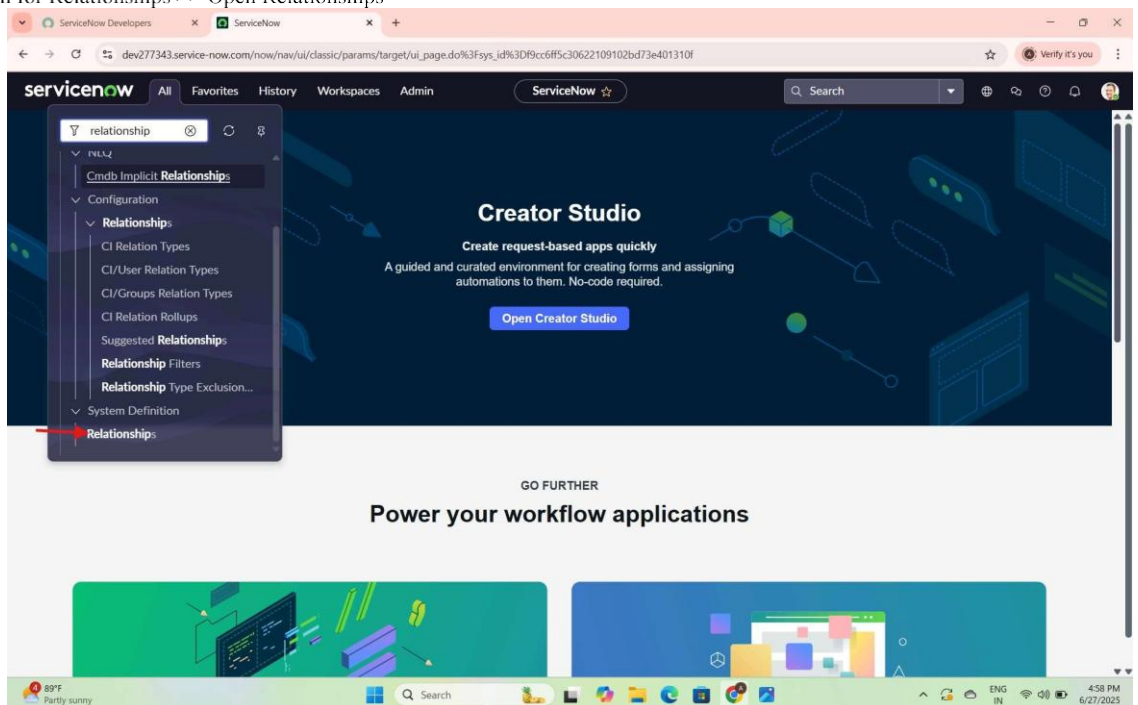
27. Make Number Read-Only Field by clicking on the gear icon and checking Read-Only
28. Make Date, Family Member Name Mandatory Field by clicking on the gear icon and checking Mandatory
29. Click on Save.

Milestone-5

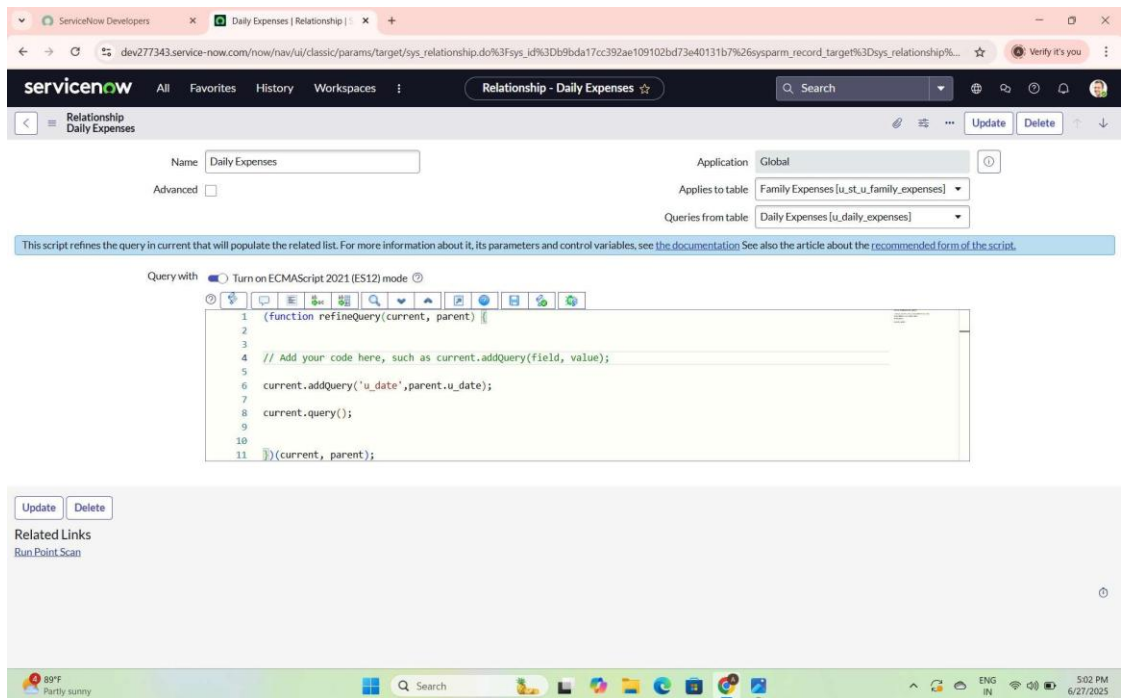
Creation Of Relationship

. Creation Of Relationship Between Family Expenses And Daily Expenses

1. Go to All >> In the filter search for Relationships >> Open Relationships



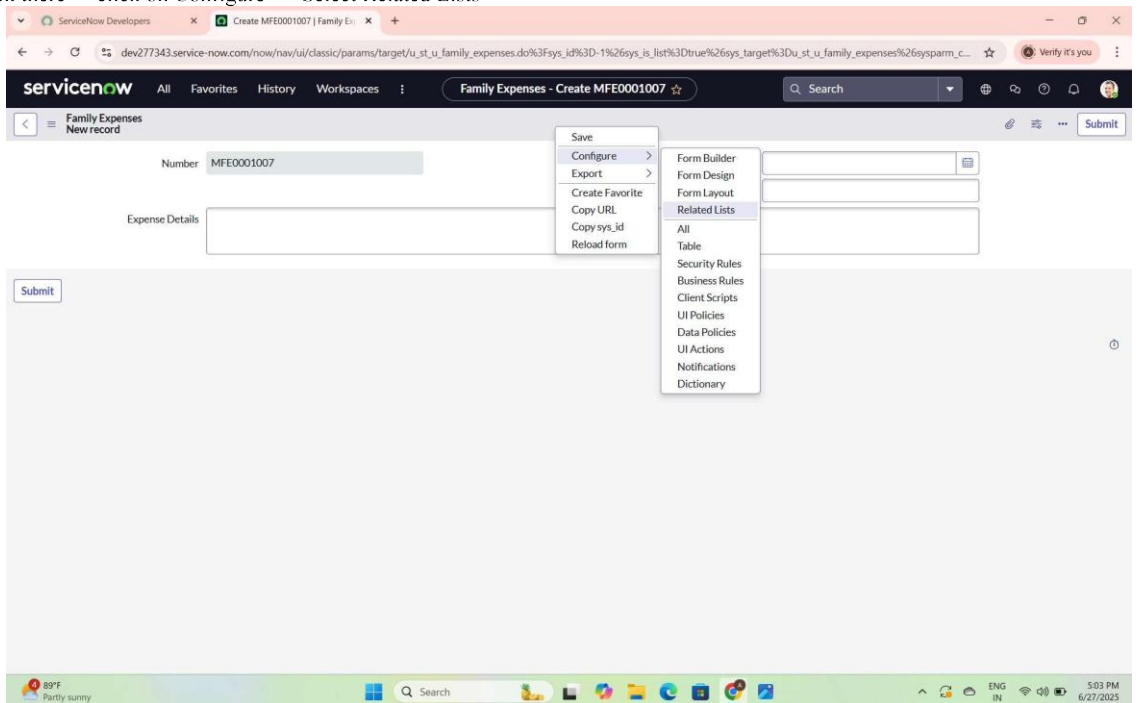
2. Click on New.
3. Enter the details: Name : Daily Expenses Applies to table : Select Family Expenses Daily Expenses : Select Daily Expenses
4. Click Save.



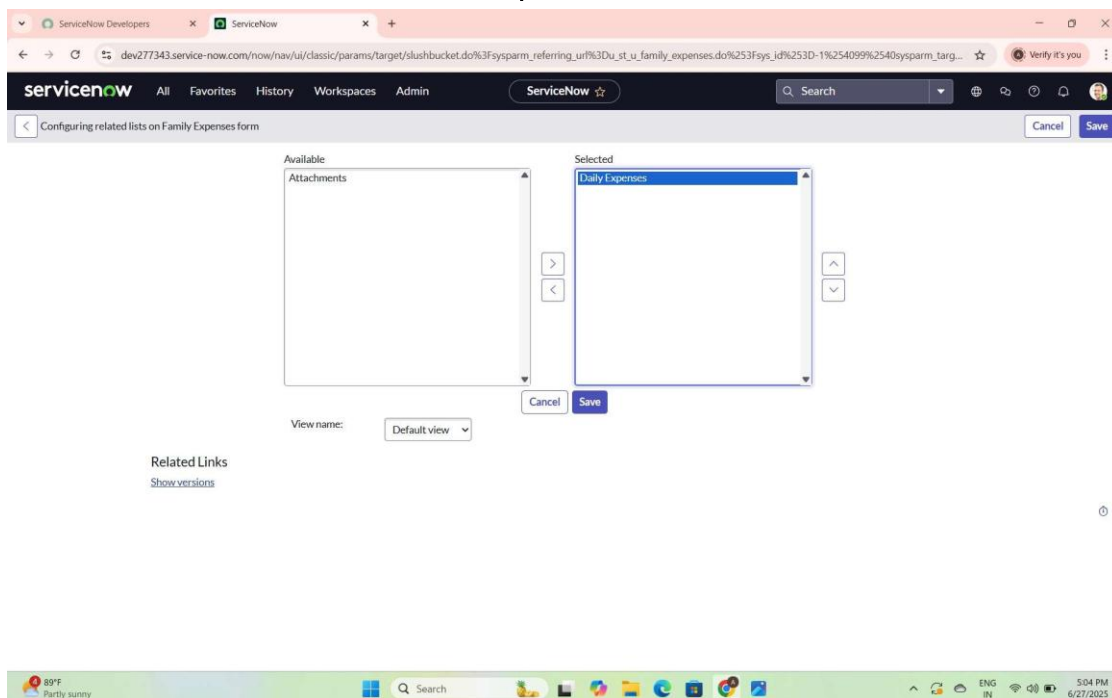
Milestone-6

Configuring Related List On Family Expenses

1. Go to All >> In the filter search for Family Expenses >> Open Family Expenses
2. Click on New
3. Go to the Header and right click there>> click on Configure >> Select Related Lists



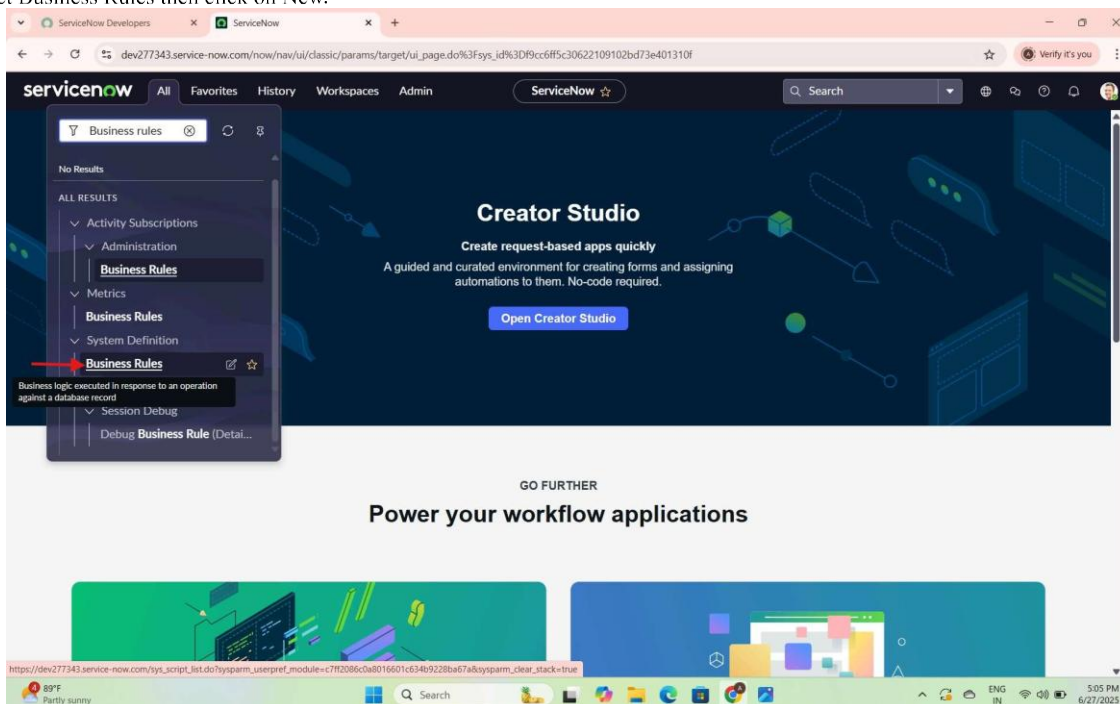
4. Add Daily Expenses to the Selected Area.
5. Click on Save



Milestone-7

Creation Of Business Rules

1. Go to All >> In the filter search for Business Rules.
2. Under System Definition Select Business Rules then click on New.



3. Enter the Details: Name : Family Expenses BR Table : Select Daily Expenses Check Advanced
4. In when to run Check Insert and Update

The screenshot shows the ServiceNow Business Rule configuration page for 'Family Expenses'. The 'Name' field is 'Family Expenses' and the 'Table' is 'Daily Expenses [u_daily_expenses]'. The 'Application' is 'Global'. The 'Active' checkbox is checked, and the 'Advanced' checkbox is also checked. The 'When to run' tab is selected, showing 'When' as 'before' and 'Order' as '100'. The 'Filter Conditions' section has 'Add Filter Condition' and 'Add OR Clause' buttons. The 'Role conditions' section has a 'Role conditions' button. The 'Update' and 'Delete' buttons are at the bottom.

5. In Advance(we write the code): Write the below code >> (function executeRule(current, previous /*null when async*/) { var FamilyExpenses = new GlideRecord('u_family_expenses'); FamilyExpenses.addQuery('u_date',current.u_date); FamilyExpenses.query(); if(FamilyExpenses.next()) { FamilyExpenses.u_amount += current.u_expense; FamilyExpenses.u_expense_details += ">" + current.u_comments + "Rs." + current.u_expense + "/-"; FamilyExpenses.update(); } else { var NewFamilyExpenses = new GlideRecord('u_family_expenses'); NewFamilyExpenses.u_date = current.u_date; NewFamilyExpenses.u_amount = current.u_expense; NewFamilyExpenses.u_expense_details += ">" + current.u_comments + "Rs." + current.u_expense + "/-"; NewFamilyExpenses.insert(); } })(current, previous);
6. Go to the Header and right click there>> click on Save.

The screenshot shows the ServiceNow Business Rule configuration page for 'Family Expenses' with the 'Advanced' tab selected. The 'Condition' field is empty. The 'Script' section is checked, and the code is written in ECMAScript 2021 (ES12) mode. The code is as follows:

```

1 (function executeRule(current, previous /*null when async*/) {
2
3
4 var FamilyExpenses = new GlideRecord('u_family_expenses');
5
6 FamilyExpenses.addQuery('u_date',current.u_date);
7
8 FamilyExpenses.query();
9
10 if(FamilyExpenses.next())
11 {
12
13
14 FamilyExpenses.u_amount += current.u_expense;
15
16 FamilyExpenses.u_expense_details += ">" + current.u_comments + "Rs." + current.u_expense + "/-";
17
18 FamilyExpenses.update();
19
20 }
21 }

```

Milestone-8

Configure The Relationship

1. Go to All >> In the filter search for Relationships >> Open Relationships.
2. In that, open Daily Expenses Relationship.
3. For Applies to table : Select Family Expenses.
4. In Query with : write the below Query. (function refineQuery(current, parent) { // Add your code here, such as current.addQuery(field, value); current.addQuery('u_date',parent.u_date); current.query(); })(current, parent);

5. Click on Update.

ServiceNow Developers | Daily Expenses | Relationship |

dev277343.service-now.com/now/nav/ui/classic/params/target/sys_relationship.do%3Fsys_id%3Db9bda17cc392ae109102bd73e40131b7%26sysparm_record_target%3Dsys_relationship%...

Relationship - Daily Expenses

Name: Daily Expenses

Advanced ☐

Application: Global

Applies to table: Family Expenses [u_st_u_family_expenses]

Queries from table: Daily Expenses [u_daily_expenses]

This script refines the query in current that will populate the related list. For more information about it, its parameters and control variables, see [the documentation](#). See also the article about the [recommended form of the script](#).

Query with ☒ Turn on ECMAScript 2021 (ES12) mode

```
1 (function refineQuery(current, parent) {
2
3
4 // Add your code here, such as current.addQuery(field, value);
5
6 current.addQuery('u_date', parent.u_date);
7
8 current.query();
9
10
11 })(current, parent);
```

Update Delete

Related Links

[Run Point Scan](#)

90°F Partly sunny

Search

ENG IN

5:11 PM 6/27/2025

Conclusion

In conclusion, implementing the "Calculation of Family Expenses Using ServiceNow" project offers numerous benefits to the household. By leveraging the robust capabilities of ServiceNow, family members can efficiently submit, track, and manage their expenses in a centralized and streamlined manner.